



U.S. General Services Administration

Federal Acquisition Service

Directed Buy

GSA Training Module for IWAC Region

Directed Buy Training Module Overview

Description: This training module will take you step-by-step through the Directed Buy document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component, specifically for the IWAC region.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

Directed Buy Glossary

| Term | Definition |
|------------------|--|
| Directed Buy | Creating a Directed Buy on the basic order bypasses the RFQ process - a single contractor is selected on the BOMSOW to be issued the order directly. |
| Dollars Subform | The Dollars Subform has fields for capturing costs, fees, totals, and other money-related values. |
| Surcharge | A type of GSA Fee where the client is charged a calculated percentage of the task item cost. |
| Surcharge Amount | The calculated product of the cost of the task item times the task item surcharge rate. |
| Surcharge Rate | A percentage used to calculate the GSA Fee if the type of fee for the task item is Surcharge. |
| Flat Fee | A type of GSA Fee where the client is charged a flat rate. |

Directed Buy Privileges

| User Role Action | Create | Edit | View |
|--------------------|--------|------|------|
| GSA user | ✓* | ✓ | ✓ |
| Client | | | ✓ |
| Contractor | | | ✓** |

*Cannot create Directed Buy if 'Publish in e-Buy' field on BOMSOW set to 'Yes'

**Can only view Directed Buy if they are the first selected contractor on the BOMSOW



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WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Select a View:

<<-- View Orders -->>

<<-- View Inactive Orders -->>

<<-- View Action Items -->>

<<-- View Support Information -->>

Go to a Specific View Item:

Go

[Create New Order](#)

Orders - Entire Package

Next -> |

▼ Order Package

▼ REQUISITION004A-COI Aaron Client (TESTING ORGANIZATION) Award Notice Issued>>ROB

00 Chronology

▼ 01 BOM/SOW REQUISITION004A - 00 Amendment 00 AWARD NOTICE ISSUED

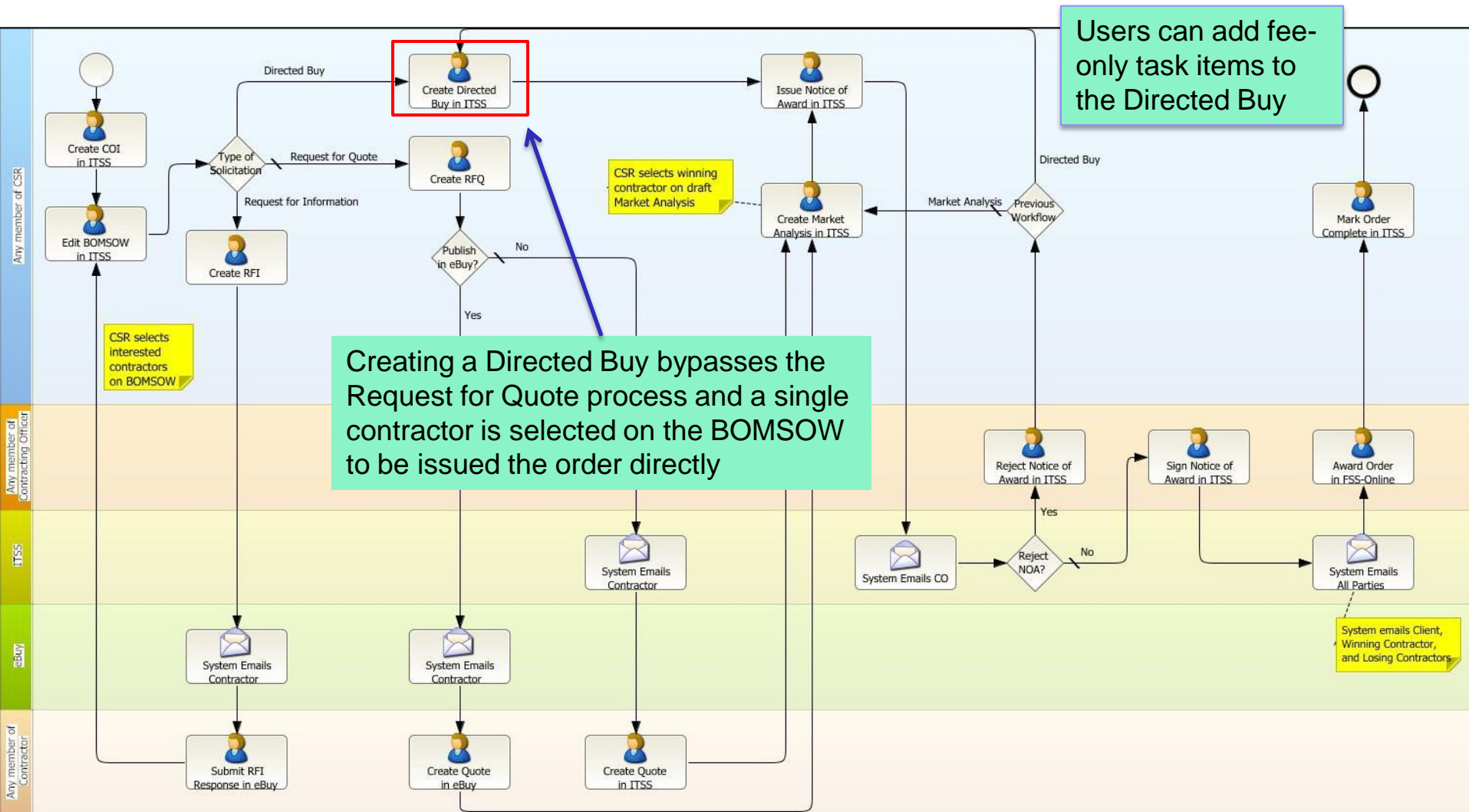
▼ Directed Buy - Revision 00

>Notice of Award - Signed

Click on the Directed Buy link in the Order Package view to open an existing Directed Buy in view mode.


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Within the Pre-Award Workflow Context



GSA users enter Contractor Proposed Amounts for each task item directly into the Directed Buy Dollars Subform. A Dollars Subform is also displayed on the Market Analysis. The Dollars Subform has fields for capturing costs, fees, totals, and money-related values.

Creating a Directed Buy

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WELCOMEORDERSFUNDINGREGISTRATIONCONTRACTS

Bill of Materials / Statement of Work

Govt. EstDirected BuyRequest QuoteEditGo To Order Package

Submitted By: CSR1 IWAC at 10/07/2010

Order ID: REQUISITION0004, Mod 00, Amendment 00

Client Rep: Jamie Client (TEST ORGANIZATION)

Status: In-Process

Date: *Desired Delivery Date*
11/01/2010

To create a Directed Buy, GSA user can click Directed Buy button on BOMSOW. If publish in e-Buy field on BOMSOW is set to Yes, Directed Buy button will not be available.

Directed Buy
Close Without
Saving

All Fields marked with are required.

Submitted By: CSR1 IWAC at 10/12/2010

Contractor: Jim Contractor (ACME FURNITURE, INC)

Contract Number: under GS-28F-0014T

Contract Type: Fixed Price

Order ID: REQUISITION0004, Mod 00, Revision 00

Status: **In-Process**Option Period:
☐ Yes
☒ No

If there is an option period
indicate Yes and enter the
option period length in years
Directed Buy
Details:
AND/OR - To complete the Directed Buy, you must enter in either Directed Buy Details (above) or attach one or more document(s)(below). You may use both - one is required.
File Attachments:
The Contractor selected on the
BOMSOW is automatically pre-
populated as the Contractor

Select a Contract Number
and Contract Type

GSA user must enter details about the
Directed Buy in the text area or attach a file

General
Comments:

Fair Opportunity Properly
Conducted: ☒ Yes ☐ No

Number of Bids:

If indicated that Fair Opportunity was properly conducted then a Number of Bids received field will be displayed and required.

If indicated that Fair Opportunity was not conducted then Exception and Justification fields will be displayed and required.

Current Project Value: \$600,750.00 (POP From Date To , Delivery Date 11/01/2010)

▼ Incremental Funding

Will this order use Incremental Funds? ☐ Yes ☒ No

Grand Total for Incremental Funding: \$600,750.00

Total Contractor Proposed Amount: \$600,750.00

▼ Fee Calculations

The following fields are used for entire Project order amounts. Task Items marked "Active" will require Funding.

Add a Task Item

Apply a single surcharge rate across all task items? ☒ Yes ☐ No

| Active | Type | Item No. | Description | Contractor Proposed Amount | Prior Cost to GSA Increase or Decrease | New Task Item Amount | Type of Charge | Fee Amount | Cost to GSA | Cost to Client | Remove |
|-------------------------------------|------|----------|-------------------|----------------------------|--|----------------------|----------------|-------------------|--------------|----------------|--------|
| <input checked="" type="checkbox"/> | COM | 0001 | Workstation | \$400,750.00 | \$0.00 \$400,750.00 | \$400,750.00 | Surcharge | 5% \$20,037.50 | \$400,750.00 | \$420,787.50 | |
| <input checked="" type="checkbox"/> | COM | 0004 | Demountable walls | \$200,000.00 | \$0.00 \$200,000.00 | \$200,000.00 | Surcharge | 5% \$10,000.00 | \$200,000.00 | \$210,000.00 | |

Click the button to calculate the total amounts

Calculate

▼ ORDER TOTALS

Prior Order Cost to GSA: \$0.00

Prior Order Cost to Client: \$0.00

Increase/Decrease Order Cost to GSA: \$600,750.00

Increase/Decrease Order Cost to Client: \$630,787.50

Total Order Cost to GSA: \$600,750.00

Total Order Cost to Client: \$630,787.50

Click *Submit* to save the Directed Buy and proceed with issuance of the Notice of Award

Submit

Close Without Saving

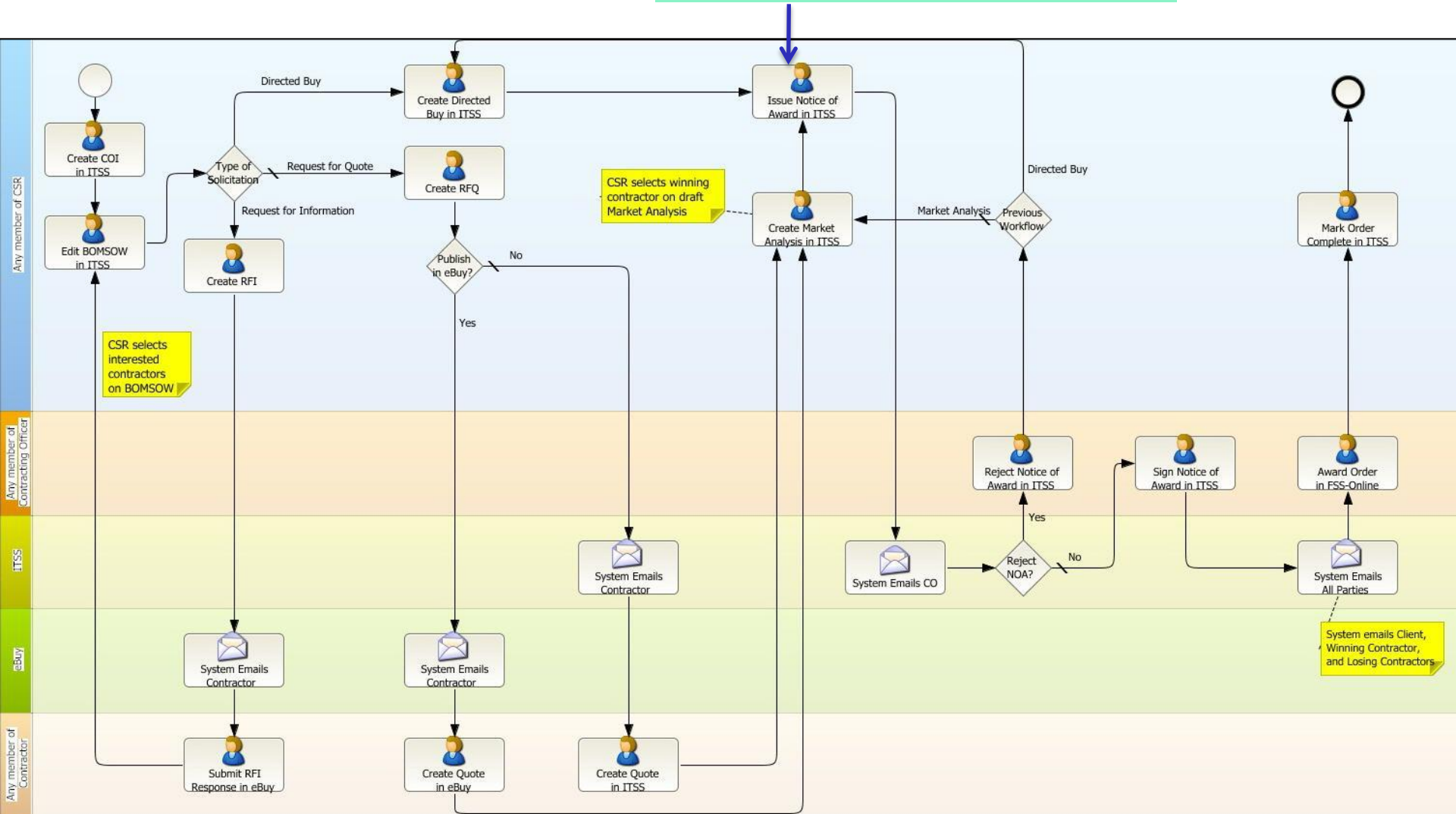
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The Dollars Subform is covered in detail within the *Dollars Subform* training module

Dollars Subform

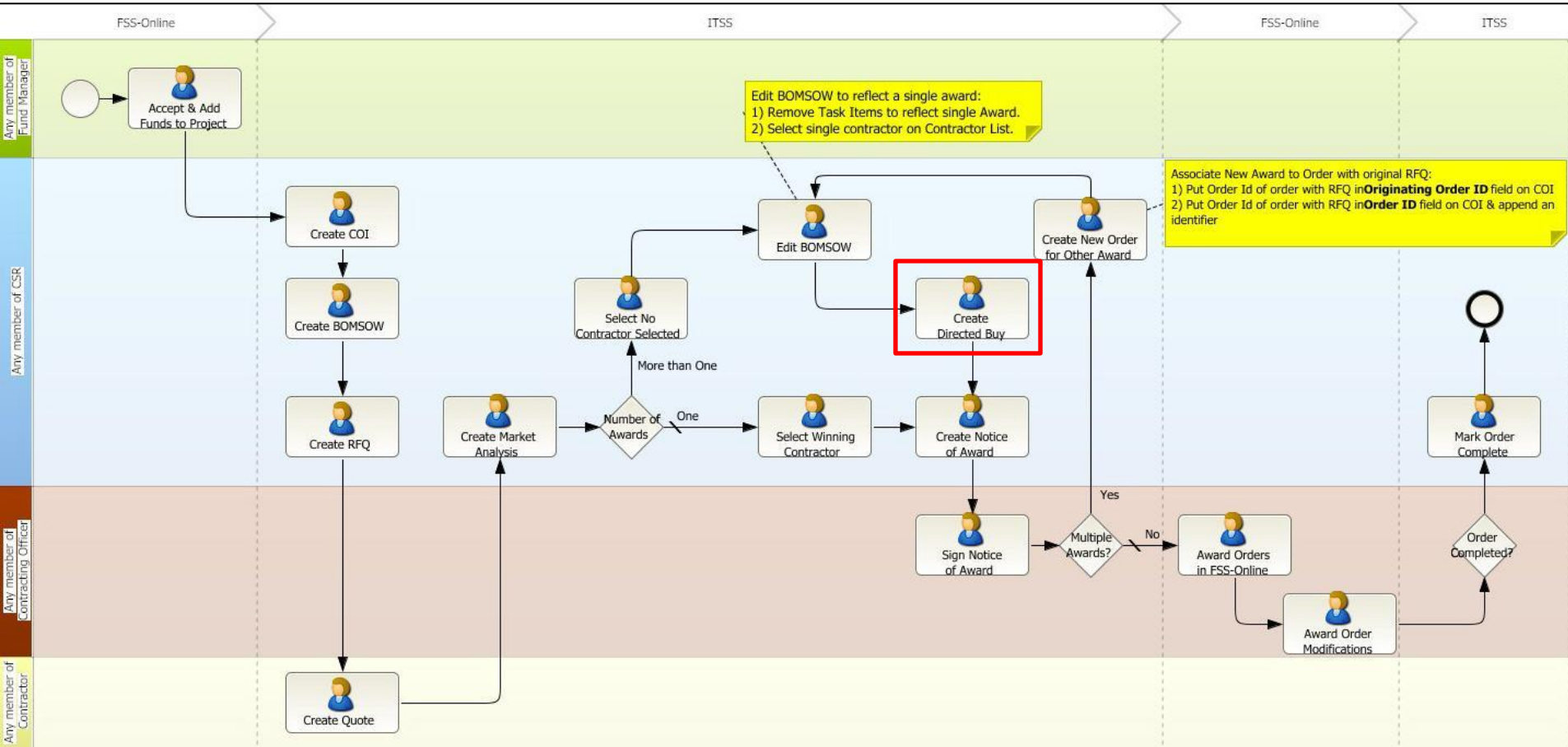
Next Steps...

After a Directed Buy is submitted, the user is able to issue a Notice of Award



All task item details (item no., description, pop/delivery date, and active flag) are locked-down as non-editable when a Notice of Award is created.

Splitting an Order into Multiple Awards



If the original order is going to be awarded to more than one contractor then the GSA user should do the following:

1. Select 'No Contractor Selected' on Market Analysis
2. Edit the task item list & Contractor list on the BOMSOW to reflect a single award
3. Create a Directed Buy and issue a Notice of Award to single contractor
4. Create new order(s) using Directed Buy and issue Notice of Award to other contractor(s)

Directed Buy Status Glossary

| Status | Definition |
|-----------------------------|---|
| In-Process | Initial starting status of Directed Buy. |
| Ready | Directed Buy has been submitted, GSA approval is not required and is ready for issuance of the Notice of Award. |
| GSA Recommended | Directed Buy has been submitted, GSA approval required. |
| Approving Official Accepted | Approving Official has accepted Directed Buy and is ready for issuance of the Notice of Award. |
| Recommendation Rejected | Approving Official has rejected Directed Buy. Order cannot proceed to the Notice of Award. GSA user must create either a new Directed Buy or new RFQ. |
| Rejected | GSA user rejected Directed Buy. Order cannot proceed to the Notice of Award. GSA user must create either a new Directed Buy or new RFQ. |

Federal Acquisition Service

Questions & Support

- For questions regarding IWAC Policy please contact stephen.gervasi@gsa.gov
- For questions regarding the RBA Directed Buy training module please contact RBA Technical Support:
 - Phone: (877) 243-2889
 - Email: helpdesk@gsarba.com

